CRM Pricing Comparison Checklist

Compare two quotes, calculate year-one cost and test the workflow your team needs before committing to a plan.

What will you actually pay in year one?

$3,000	+ $3,000	= $6,000
10 seats × $25/month × 12	Setup and operating costs	First-year total

Illustrative USD example. Extra costs cover setup, migration, integrations, training and upkeep.

Your first-year cost

	QUOTE A	QUOTE B
Paid seats × contracted rate × paid months		
+ Setup, migration and initial training		
+ Integrations, add-ons, usage, admin and support		
= Total first-year cost		
Year-two recurring cost at projected headcount		

13 checks before you choose

Mark each item P (passed), ? (unverified) or X (gap). Circle any must-have.

		A	B
Budget & quote			
01	**Required plan and billing term** Quote the lowest tier that covers your must-haves.		
02	**Seats, minimums and growth** Price current seats and your 12-month headcount.		
03	**Setup and migration** Include configuration, data cleanup and import.		
04	**Training, admin and support** Price team training, upkeep and support coverage.		
05	**Add-ons, quotas and overages** Check storage, API, email and automation limits.		
06	**Renewal and exit terms** Confirm increases, renewal dates and export fees.		
Workflow & fit			
07	**Lead capture and routing** Submit a test lead and verify who receives it.		
08	**Pipeline and follow-up** Move a deal and check the next task or alert.		
09	**Reporting and visibility** Build the dashboard your manager needs weekly.		
10	**Integrations and data sync** Test one real handoff with your key business tool.		
11	**Permissions and exports** Verify role access and a usable records export.		
AI & rollout			
12	**AI accuracy, controls and cost** Test summaries or drafts with sample data and check limits.		
13	**Team adoption and rollout** Have a rep run the workflow and estimate rollout time.		

Take one workflow into your evaluation

Example Web enquiry → assigned rep → follow-up task → visible pipeline update

My workflow _____

Success looks like _____

Start a trial when you can test the workflow yourself. Book a demo if a must-have is still unresolved or you need help validating migration, integrations or plan fit.

Ready to Choose a CRM That Delivers Real Value?

Compare your requirements with ConvergeHub's CRM capabilities and see how it can help streamline your sales and customer management processes.

Explore ConvergeHub Today

Start Your Free Trial

Prefer a Guided Walkthrough?

Book a Free Demo

Bring your completed checklist to the demo for a walkthrough focused on your requirements.